



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title
Mail Services Assistant

Job Code Title
Mail Clerk

Pay Band
02

Job Code Number
439512

Information Technology and Processing Division
Processing and Retention Operations Bureau
Mailroom and Records Management Unit

Fair Labor Standards Act
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Processing and Retention Operations Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Data Capture, E-Services, and Mailroom and Records Management. The Mailroom and Records Management Unit is responsible for the secure handling, delivery, and processing of department mail and taxpayer records.

Job Responsibilities

The Mail Services Assistant receives, collects, processes, and delivers incoming and outgoing mail according to US Postal Service (USPS) and department postal procedures, regulations, and requirements using automated processing equipment and mail tracking systems. The incumbent provides a range of administrative services in support of data processing, records management, and taxpayer registration functions. The position reports to the Mailroom and Records Management Unit Manager and does not directly supervise other staff.

• Mail Processing 70%

1. Receives, sorts, and date stamps mail according to internal procedures and type. Separates priority, certified, registered, confirmed, insured, and other recorded mail for specialized processing. Counts incoming mail using mail processing equipment. Updates daily report for all incoming mail and backlogs.
2. Distributes mail to processing staff based on type of mail by opening, sorting, and screening mail. Routes tax payments to cashier unit for immediate deposit. Routes correspondence by looking up account information related to tax documents.

3. Records tracking details for certified, registered, insured, delivery confirmed, and other specialized mail services according to department and USPS regulations. Verifies tracking forms when received.
 4. Performs daily mail out functions for the department for a limited group of tax forms and letters. Ensures accuracy and confidentiality of documents along with proper delivery instructions for specific postage requirements such as certified mail.
 5. Performs routine maintenance on automated mail opening equipment, troubleshooting problems, and working with supervisors and vendors to resolve more complex problems.
 6. Ensures secure handling and delivery of information and materials to appropriate parties.
- **Processing Support Services 25%**
 1. Assists with taxpayer registration by updating or adding taxpayer account information from paper documents or electronically filed tax returns using system registration functions for a limited number of tax types.
 2. Assists with records management to ensure easy access, efficiency, and completeness of records. This may include retrieving and routing files for requestors, updating file out-slips, organizing files by document retrieval numbers, sorting and routing information, searching for lost files or contents, and closing or purging files.
 3. Receives and reviews tax documents for accuracy and completeness. Sorts tax returns for further processing.
 4. Identifies errors and omissions and resolves basic errors or refers to appropriate staff for resolution.
 5. Numbers tax returns using an automated numbering machine, sorts them into batches, and routes documents according to desktop instructions to appropriate staff.
 6. Works with other staff to verify data; correct errors; locate lost documents, payments, and refunds; and ensure that account information is filed appropriately.
 7. Takes part in testing new or changed processes to find and solve problems and help determine the effectiveness of the process.
 8. Responds to requests and questions from other units by locating and providing requested information and referring specific and technical issues to appropriate staff.
 - **Other Duties 5%**
 1. Performs a variety of other duties as assigned by supervisors.

Job Requirements

To perform successfully a mail services assistant the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; following written and oral directions and instructions; identifying and correcting data errors; troubleshooting routine technical and mechanical equipment problems; and word processing, spreadsheet, and specialized database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of USPS and department postal procedures, regulations, and requirements; records management; and customer service standards. The incumbent must have the ability to develop a progressively responsible knowledge of department work units, functions, and operations.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is graduation from high school or GED and one year of job-related work experience.
 - Work experience should include mail services, office operations, and/or records management.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires computer and keyboard use and being seated for extended periods of time. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is moderate, reaching 20-35 pounds and includes carrying larger items such as tubs of tax returns and pushing or moving carts. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____